

*Fig. 1*

CALL SCREEN

FILE CONTACT PHONE HELP

CONTACT NAME: FIRST LAST SSN

CONTACT DISCUSSION

+ ACCOUNT ADMIN/MAINT

ACCOUNT MAINT-OTHER

ADDRESS CHANGE/UPDATE

ASSET ALLOCATION & ERISA

BALANCE/VESTING INFO

BENEFICIARY

IP ROLE SPOUSE

12

*Fig. 2*

CALL SCREEN

X

FILE

CONTACT

PHONE

HELP

CONTACT NAME: 

FIRST LAST SSN

CONTACT

DISCUSSION

CONTACT HISTORY

SCHEDULED CONTACTS

ASSOCIATED CAMPAIGNS

CURRENT CAMPAIGN

34

36

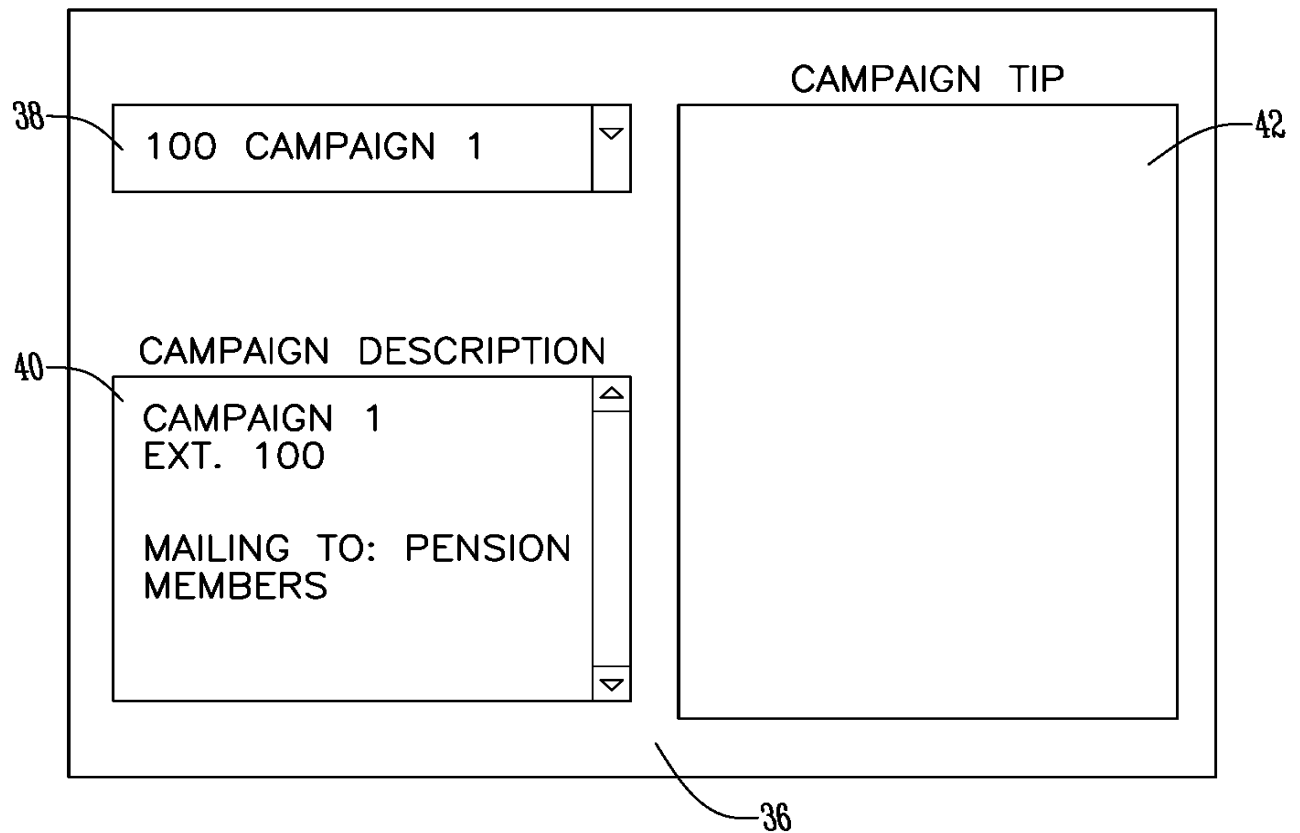
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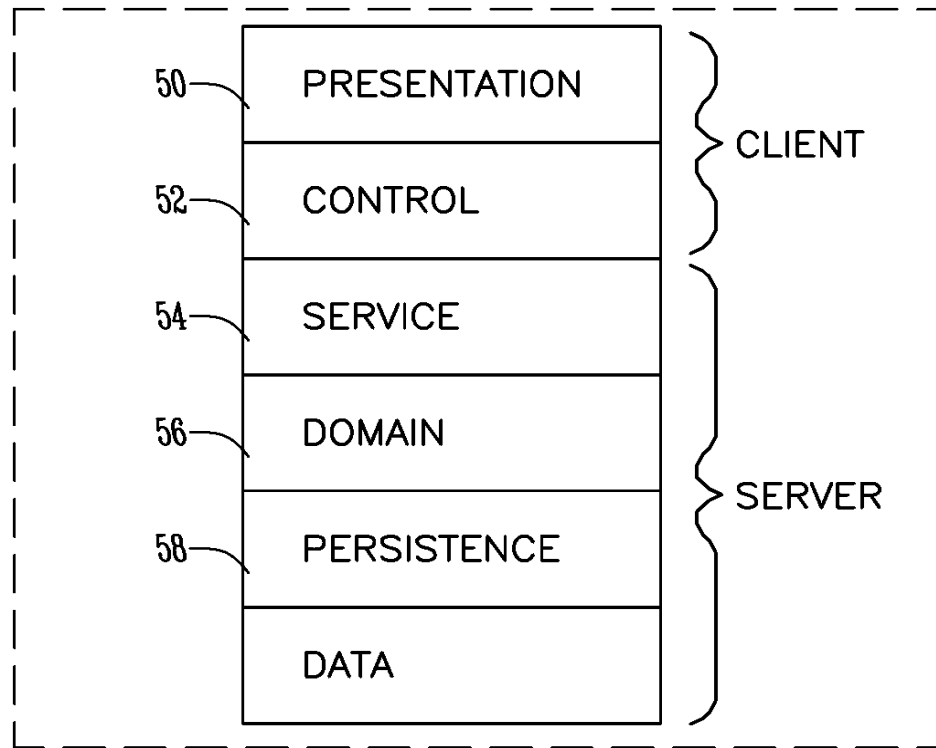
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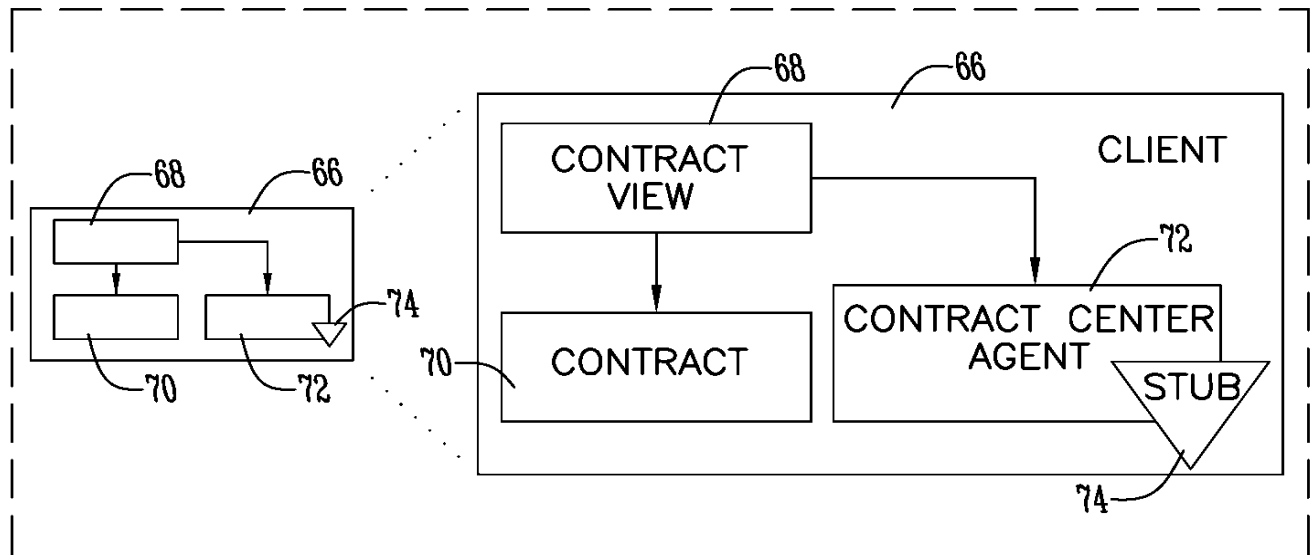
Fig. 3



*Fig. 4*



*Fig. 5*



*Fig. 6*

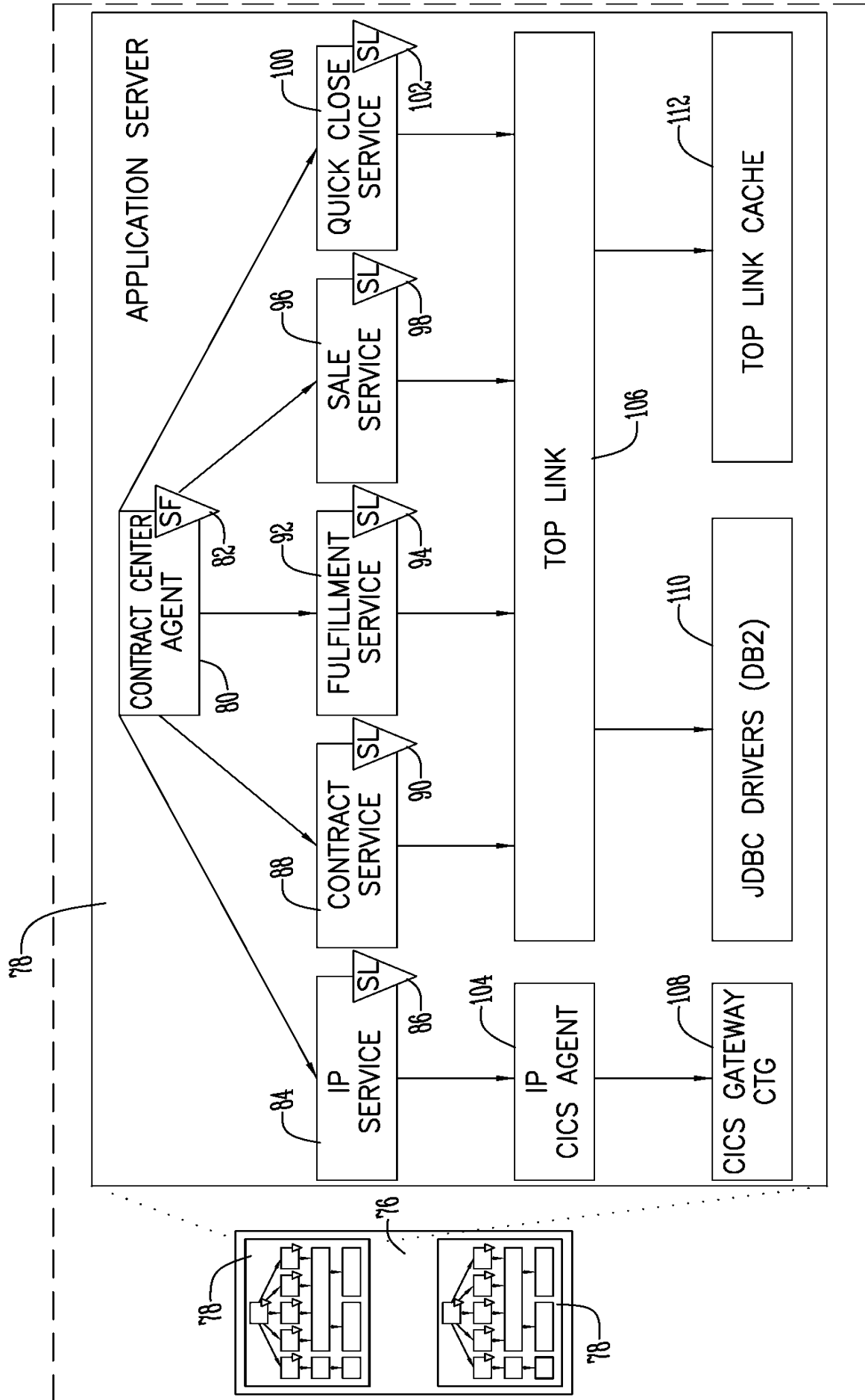


Fig. 7

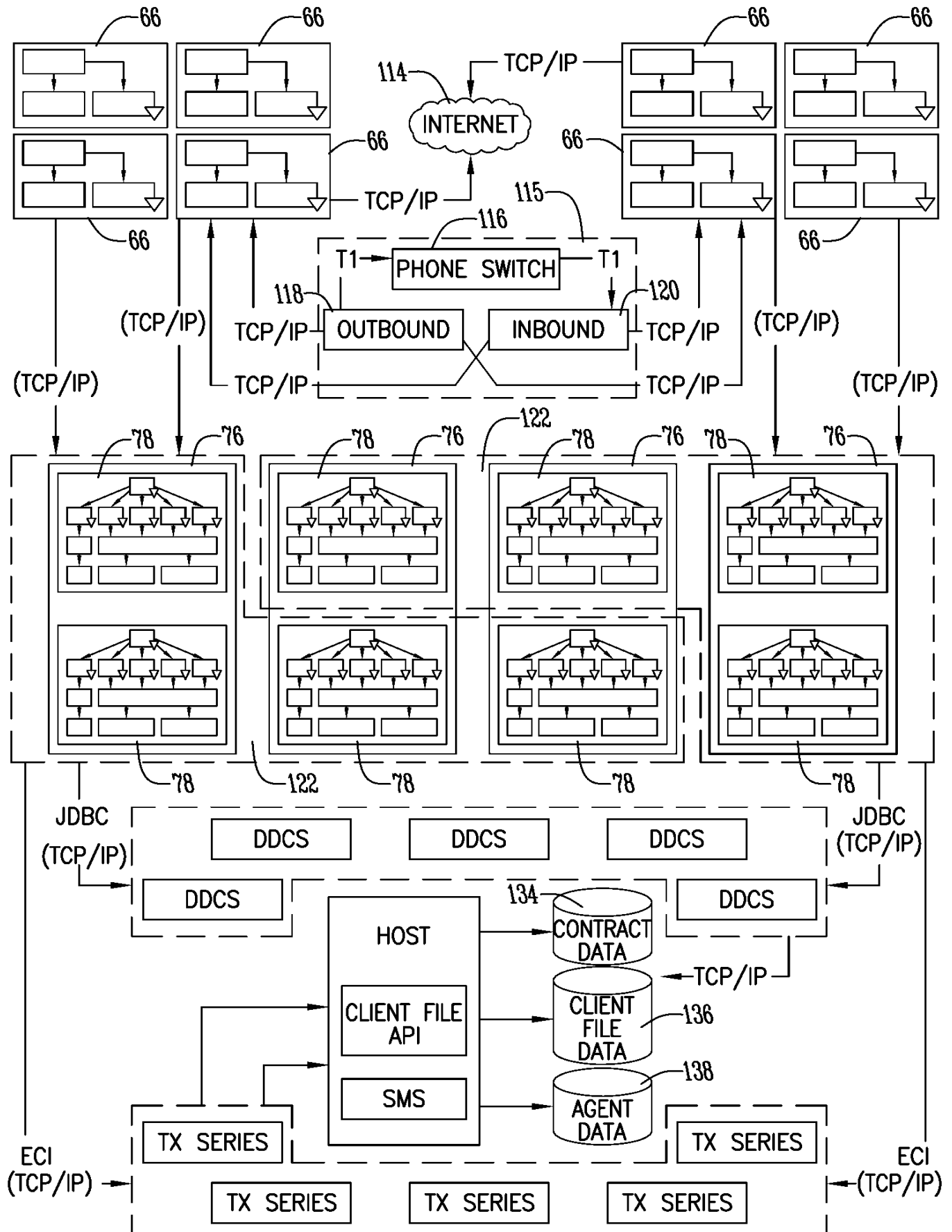


Fig. 8